YOUR  
LOGO

**COMPANY NAME**

MARKETING AUTOMATION SETUP PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] for your marketing automation setup. We specialize in configuring powerful automation systems that streamline marketing processes, improve lead nurturing, and increase overall efficiency.  
  
This proposal outlines how we will support [Client Name] in implementing a robust marketing automation system tailored to your business needs.

# Problem or Opportunity

[Client Name] is looking to reduce manual marketing tasks, improve targeting, and scale communications. Without automation, lead follow-ups, segmentation, and customer journeys are inconsistent or time-consuming.

# Proposed Solution

We propose to design and implement a marketing automation system using your preferred platform (e.g., HubSpot, ActiveCampaign, Mailchimp, Klaviyo, etc.).  
  
Key Benefits:  
- Improved lead nurturing and follow-up  
- Increased professionalization and segmentation  
- Time-saving automation of repetitive tasks

# Scope of Work

Our marketing automation setup includes:  
  
- Platform selection and account setup  
- CRM and list integration  
- Workflow design (welcome series, re-engagement, cart abandonment, etc.)  
- Email template design and automation logic  
- Tracking, tagging, and goal setup  
- Testing and training

# Timeline

Estimated timeline for implementation and hand off:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Kickoff & Discovery | Understand goals and workflows | [Start Date] |
| Platform Configuration | Set up CRM, email, and tracking | [Date] |
| Workflow Design | Build and automate marketing flows | [Date] |
| Testing & Training | Final testing and hand off session | [Completion Date] |

# Pricing

One-time setup fee or phased billing for automation implementation:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Platform Setup | Account configuration and integrations | [Amount] |
| Workflow Development | Build and test automation logic | [Amount] |
| Email Templates | Design and code automated emails | [Amount] |
| Training & Documentation | Walkthrough and reference materials | [Amount] |
| Total |  | [Total] |

# About Our Company

[Your Company Name] is a digital marketing consultancy specializing in automation systems that help businesses scale communications and drive revenue.  
  
- Experience: [X] years in CRM and marketing automation  
- Platforms: HubSpot, Klaviyo, Mailchimp, ActiveCampaign, and more  
- Mission: To simplify your marketing and increase efficiency through automation

# Case Studies / Testimonials

Case Study: [Previous Client Name]  
  
- Project: Marketing automation for B2B SaaS company  
- Outcome: 3x increase in email engagement and 40% increase in demo bookings  
  
Testimonial:  
“[Your Company Name] built our entire automation system from scratch. We now run 10+ workflows with zero manual effort.” — [Client Name], [Title], [Company]

# Terms and Conditions

Payment Terms: 50% deposit to start, 50% upon delivery.  
Revisions: Includes two rounds of logic or workflow adjustments.  
Cancellation Policy: 14-day notice required before work commences.

# Acceptance

To proceed with the automation setup, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client’s Printed Name]  
Title: [Client’s Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_